

Key global workforce insights from Kelly®

DO IT YOURSELF

career resilience

A GUIDE FOR EMPLOYERS

KELLY

Introduction

In today's uncertain job environment, global workers are seeking ways to be as resilient as possible. This includes taking the lead in managing their careers. Workers are becoming adept at developing skills that enable them to thrive in any company—they'll utilize available employer training, or they will actively seek ways to further their skill sets, perhaps by becoming free agents or freelancers.

As an organization, it's important to understand the implications of this shift to **do-it-yourself (DIY) career resilience**. The very workers that you want to hire—valuable employees proven to have higher loyalty, show greater effort and added value—are the workers that may be increasingly harder to engage and retain.

To gain a competitive advantage, today's employers must create an innovative, collaborative work environment, green-lighting workers to showcase their skills, while strengthening their employer brand, which could lead to an enhanced ability to attract new talent. In this age of do-it-yourself career development, employers need to invest in their most valuable talent—who are likely the most agile, mobile, and prepared to move on to the next opportunity.

As a pioneer in the staffing industry, and in the study of workforce preferences, Kelly takes a high-level look at career resilience as it pertains to the global worker today. In addition to analyzing worker preferences and psychographic insights based on survey data from the 2015 and 2014 Kelly Global Workforce Index™ (KGWI), this report pulls insights from Kelly Free Agent research (2015) survey data and other research sources. Unless otherwise noted, all statistics come from recent Kelly workforce research data.

Visit kellyservices.com for additional reports, articles, and insights.

Background: evolving career development paradigms

Technological, economic, and demographic forces are steadily eroding traditional career paths and leading to the rise of DIY career development.

Key drivers:

- Millennials
- Technology advancement
- Market uncertainty
- Demand for work-life design

Old career development paradigm: productive employment	New career development paradigm: potential employability
A relatively stable economy supported a paternalistic employer approach and a fostered sense of security and loyalty among employees	A dynamic global economy, plus accelerated technological change, shortens employers' time horizons and increases employee unease
While always mindful of economic cycles, employers would invest in expanding their permanent workforce whenever market conditions made this feasible	Volatile market conditions in recent years have made many employers wary of adding to their permanent payrolls, and more receptive to the concept of a scalable, variable workforce
Employees typically worked together in teams at one physical location, and work environments and schedules were both highly structured	Technology enables geographically dispersed work teams, and higher skilled talent increasingly considers flexibility in work arrangements to be a key factor in their employment decisions
The silent generation, and to a lesser extent baby boomers, placed a high value on security and continuity in their careers/employment	Millennials—the "DIY generation"—are comfortable piecing together income from multiple sources and with uncertainty; this generation is influencing employment dynamics via its sheer numbers
There was lengthy tenure with one employer, and often one skill set	Careers are now developed across multiple employers, and often multiple skill sets or industries
Employees were loyal to one/few employers	Talent is willing to shift employers and/or status, becoming freelancers
Employers identified high-potential employees, guided career development plans, and directly provided or sponsored training in skills required to keep their company successful and innovative	Highly skilled talent takes the lead in managing their own career, developing skills that enable them to thrive in any company; they utilize available employer offerings or actively seek alternatives
Off-site learning options required being on campus at designated times, and were often expensive—even with employer subsidies	Multiple free or low-cost options, including MOOCs such as courses offered by Coursera, are available online or in the mobile formats that millennials prefer



TRAIN

“Job life cycles have shrunk now to their shortest period of time that they ever had in human history. The ability of a job to persist, requiring the same skills and the same context, is down to 5 – 7 years with more room to shrink. The need for workers to retrain and upskill has never been higher. But we don’t have the fallback in our companies because the tenure of employees has never been smaller. When we talk to millennials, they plan to stay at a company for 3 – 5 years.”

—*Kelly Services CEO Carl Camden*

The new employability paradigm

There's an inherent paradox in the new paradigm: To gain competitive advantage, an employer has to focus learning/development investments on the most valuable and most agile/mobile talent.

Focus career development on your most critical talent who are:

Most engaged/most productive / Most digitally savvy / With critical skill sets that are in short supply

1

ACCEPT THE RISKS

- Understand and accept that this talent is also the most able and likely to leave
- Believe higher churn is part of the equation; you can't get higher level talent without some higher risk

2

CREATE A CULTURE OF CONTINUOUS LEARNING

Support/encourage DIY career development via:

- Collaborative learning
- Skills development
- Leadership development

3

UTILIZE YOUR SOCIAL CAPITAL

Engage/collaborate with all available sources of innovation and transformational value:

- Business partners
- Customers
- Suppliers

4

GAIN COMPETITIVE ADVANTAGE

- Higher loyalty, greater effort, and added value come from your most valuable employees
- Strong employer brand leads to enhanced ability to attract new talent
- Culture of collaboration and innovation



VALUE

THE RISE OF RECRUITMENT MARKETING IN THE ERA OF CAREER RESILIENCE

As candidates take on their job searches much like they would a new car or house, by doing due diligence via online research, if your organization has not built a strong presence on those online channels, you won't make it onto the radar of today's top talent. A great way to develop and present your employer brand effectively is by using an Employer Value Proposition (EVP). This can help to ensure that your brand values are identified and translated correctly, and candidates will be able to learn more about your company culture and business goals across your marketing channels.

Employer branding fosters career resilience

With top talent becoming increasingly mobile, improving an organization’s employer branding keeps it competitive for the best talent.

One out of three hiring managers will focus on employer branding in the next three to five years, and almost half (47 percent) will prioritize the candidate experience—a key component to an organization’s reputation as an employer.

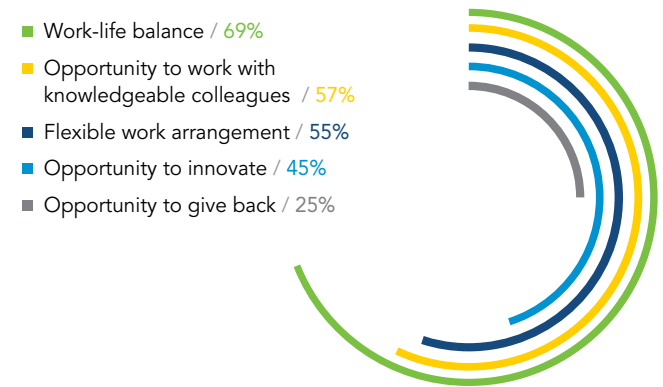
Top organizations like Google® and Apple® do not have talent shortages; in fact, with more than 3 million applicants a year, Google has a “talent sorting” challenge.¹ What sets top firms apart from organizations experiencing talent shortages is a strong employer brand, when talent knows a company offers a place to do their best work and make an impact.

Employer branding is largely being led by technology, creating a “no place to hide” environment where reputation means everything. Candidate experience is critical, as it can shape a company’s reputation among candidate circles quickly via technology—just half (50 percent) of workers were satisfied with their last application experience.

- **71%** of workers use social media for networking, and just 34% use social media to make career decisions; hiring managers plan on boosting their employer brand with social media platforms in the next 3 – 5 years (47%) as well as keeping career websites up to date (44%), fresh, and relevant
- With **73%** of job seekers starting their search on Google,² hiring managers know they need to keep up with how their employer brand is being communicated

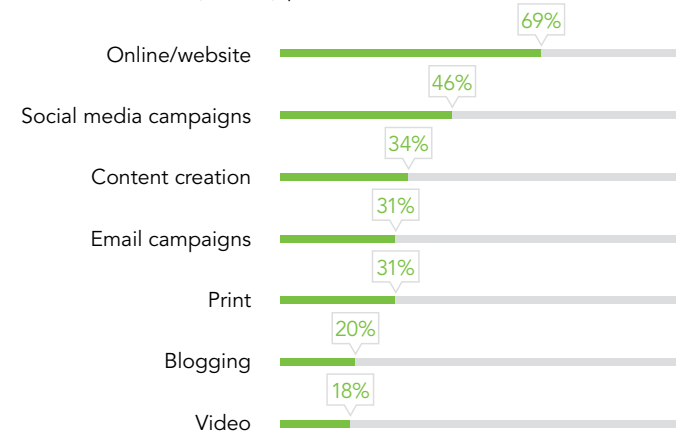
A work environment with work-life design elements attracts top talent

Workers cite what makes an organization attractive/drives the decision to pick one employer over another, by percent:



Communicating employer brand:

What assets hiring managers are investing in over the next 3 – 5 years, by percent:



Keeping skills current is a top concern

In an age of uncertainty, workers are more concerned about whether they have the up-to-date skills needed to remain employable over the long term than they are with losing their current job.

Concerns regarding skill obsolescence are greatest at opposite ends of the generational spectrum

The oldest cohort is the most concerned by far about keeping skills current. This likely reflects the prevalence of free agents (67 percent) in this generation, since free agents

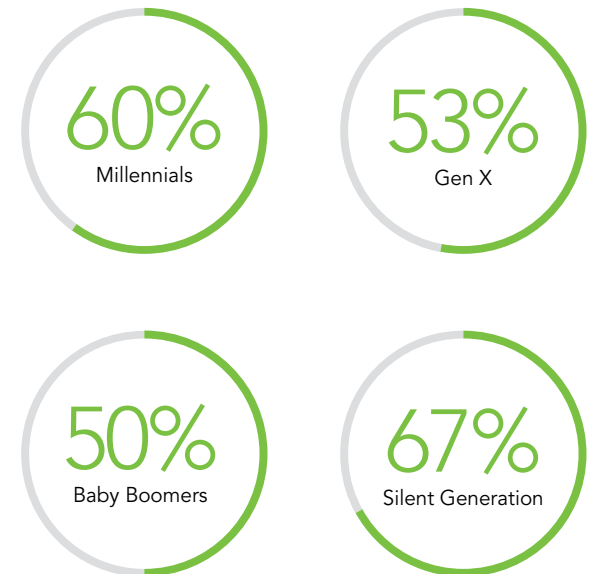
have to continuously “sell” their skills to new clients. This may also reflect concerns regarding age discrimination, as well as the need to fight stereotypes that workers this age are not tech-savvy.

Millennials’ level of concern with keeping skills current reflects the uncertain economic times that they grew up in, their fascination with technology and disruptive business models, and their relatively high degree of comfort with change.

Overall, 56 percent of workers say they are more concerned about their knowledge/skills becoming obsolete or outdated than they are about a possible layoff.

By generation

- OBSOLETE SKILLS/KNOWLEDGE TOP CONCERN
- LAYOFFS TOP CONCERN



Keeping skills current is a top concern (continued)

Geographically, APAC workers are significantly more concerned with skills remaining current

Professional/technical (PT) workers represented more than half of the workers surveyed in APAC, and several PT disciplines reported meaningfully higher than average concerns with skills obsolescence versus layoffs (74 percent of finance and accounting, 73 percent of IT, and 70 percent of engineering workers).

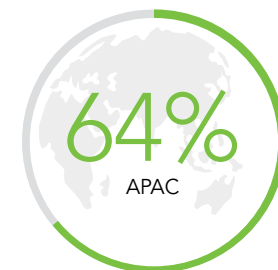
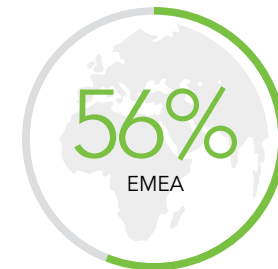
Impending IT skills shortages in APAC, and the potentially negative impact on the region's competitiveness, have been well publicized.

For networking skills alone, a 2013 IDC study forecast a shortage of 483K FTEs in the region,* or 31 percent of demand, by 2016. Cisco®, which commissioned the IDC study, subsequently committed to develop 400,000 networking professionals over five years to help address IT skills shortages in APAC. As a result of moves by Cisco and other employers, IT talent in APAC is likely feeling significant pressure to continuously upgrade skill sets.³

*Excluding Greater China and Japan

By region

- OBSOLETE SKILLS/KNOWLEDGE TOP CONCERN
- LAYOFFS TOP CONCERN



Keeping skills current is a top concern (continued)

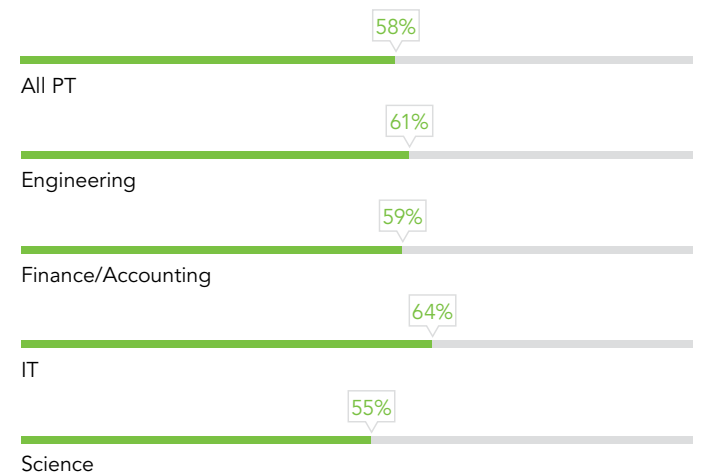
PT workers have meaningfully higher concerns regarding skills obsolescence, especially those in IT

It's not surprising that IT workers are feeling particularly vulnerable to skills obsolescence. IDC has stated the IT industry is in the midst of a "once every 20 – 25 years" shift to a new technology platform for growth and innovation. IDC terms this "the third platform" built on mobile devices and apps, cloud

services, mobile broadband networks, big data analytics, and social technologies—and states at least 80 percent of the industry's growth and enterprises' highest-value leverage of IT will be driven by third platform technologies as well as an explosion of new solutions built on the new platform. By 2020, these technologies will represent 80 percent of all IT spend.³

By PT skill set

- OBSOLETE SKILLS/KNOWLEDGE TOP CONCERN
- LAYOFFS TOP CONCERN



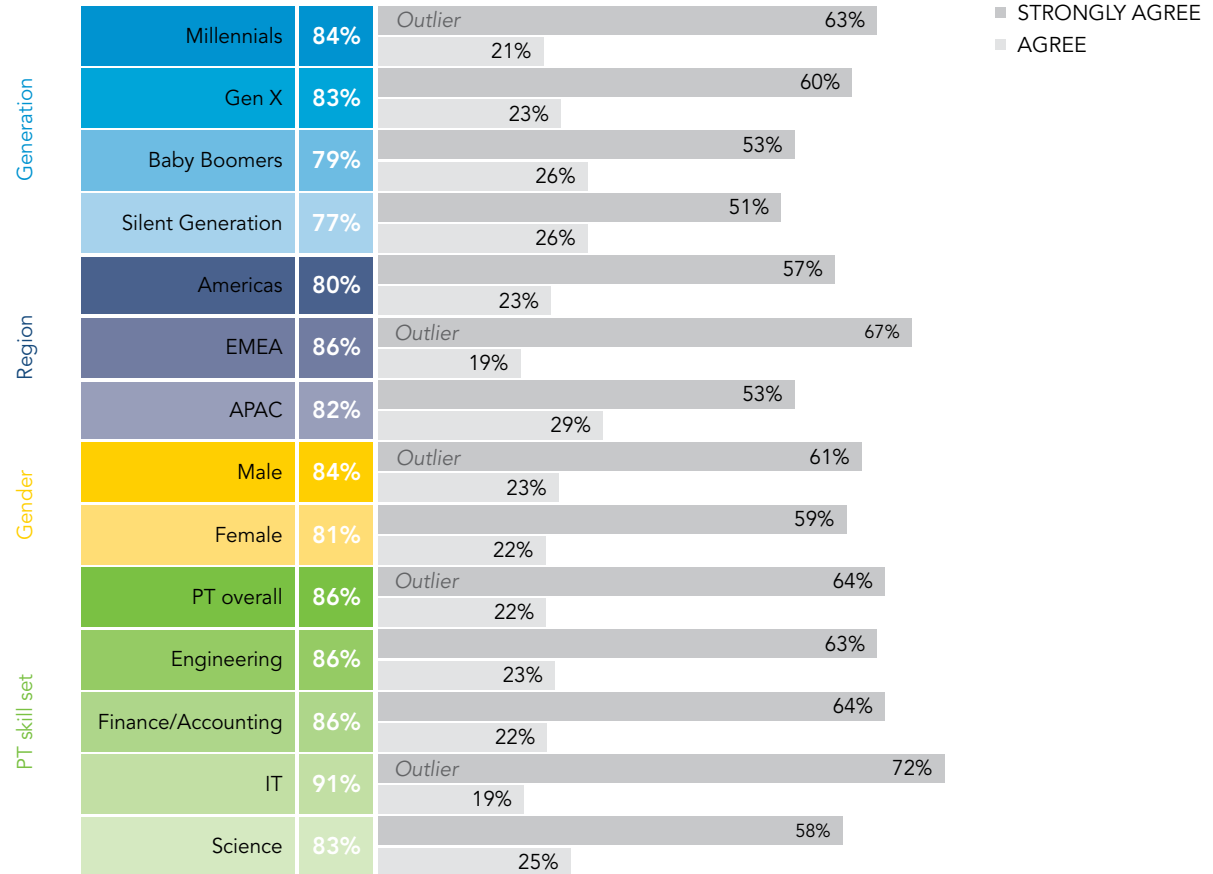
Science is an outlier among PT disciplines, with relatively low concerns about keeping skills current.

The vast majority of workers want to grow their skill sets

Across the board, talent seeks to keep their skills current. Learning opportunities make employers more attractive and are highly rated drivers for accepting one position over another.

Overall, 82 percent of workers feel their skills/knowledge will need to evolve and grow in order to keep up with changes in their line of work and industry. Any way you slice the population, the vast majority of workers agree/strongly agree.

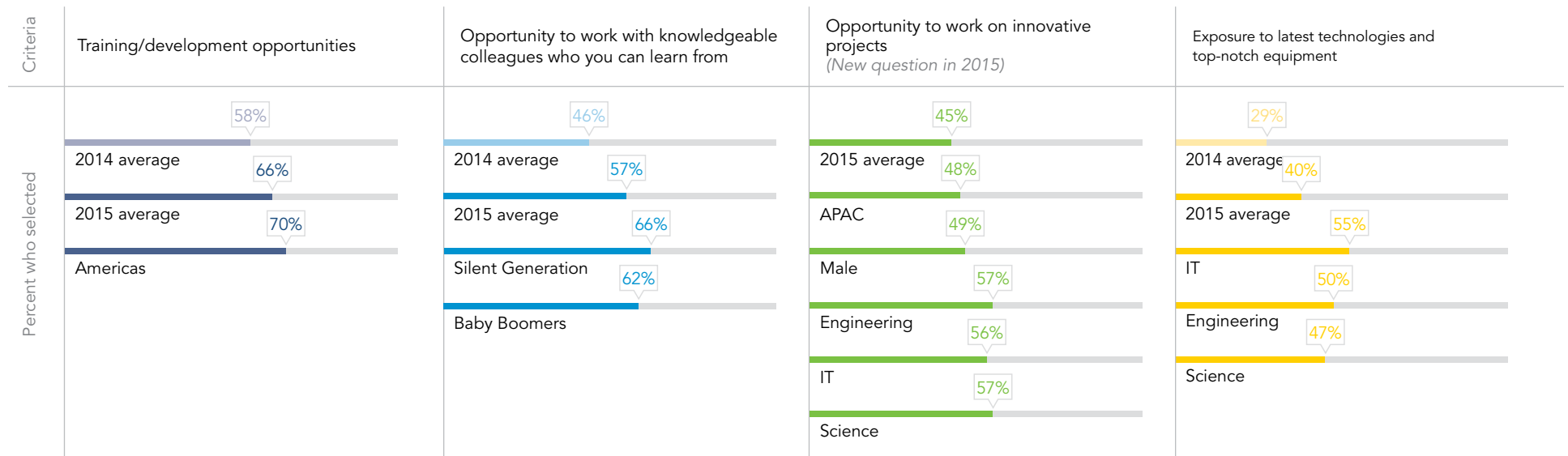
While 60 percent of workers overall feel strongly that their skills/knowledge need to grow and evolve, there were a number of subsets that felt more strongly about this than others. Statistical outliers (millennials, workers in EMEA, males, total PT and IT) are indicated to the right:



The vast majority of workers want to grow their skill sets (continued)

An employer who offers opportunities to acquire new/cutting edge skills and capabilities is attractive to a growing number of employees, and these opportunities can be decision drivers in selecting new positions or employers.

Indicated below are those cohorts who value these skills development criteria meaningfully higher than the average.



Employer investment in training/development is falling short

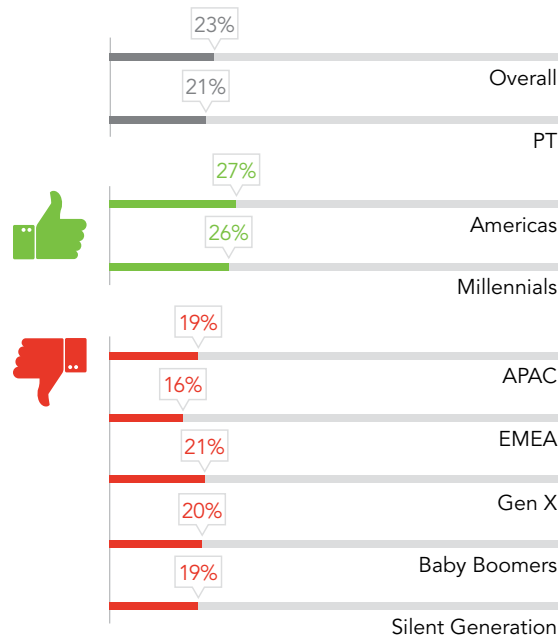
Both employees and employers feel current investment in training/upskilling is inadequate.

Talent Perspective

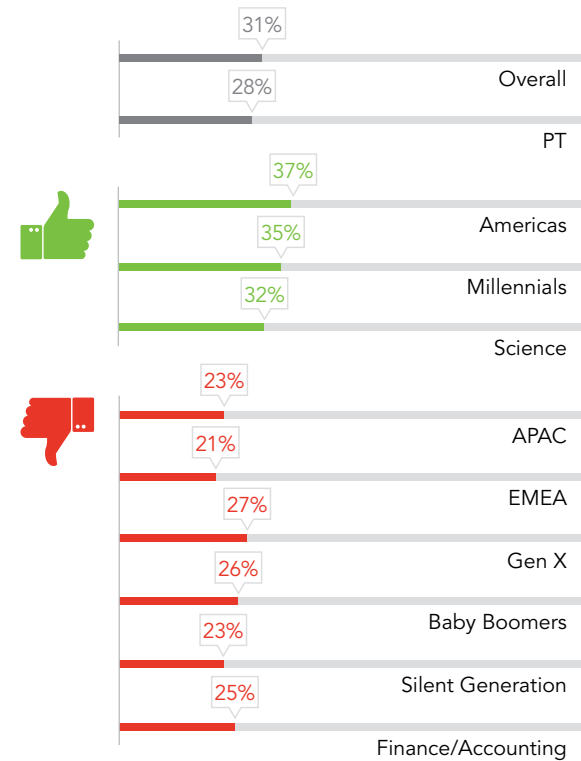
Only a minority feels their organization is investing in training/upskilling, and PT talent is an outlier on the downside. Overall, just 45 percent of workers feel their company is making the investment, while only 23 percent strongly agree. Of concern for employers, only 21 percent of PT talent strongly agreed.

At 31 percent, less than a third strongly agree that hands-on/on-the-job learning is encouraged. Again, sought-after PT talent is a negative outlier, with only 28 percent strongly agreeing.

Workers who strongly agree that their organization is investing in training/upskilling:



Workers who strongly agree that their organization encourages hands-on/on-the-job training:



Employer investment in training/development is falling short (continued)

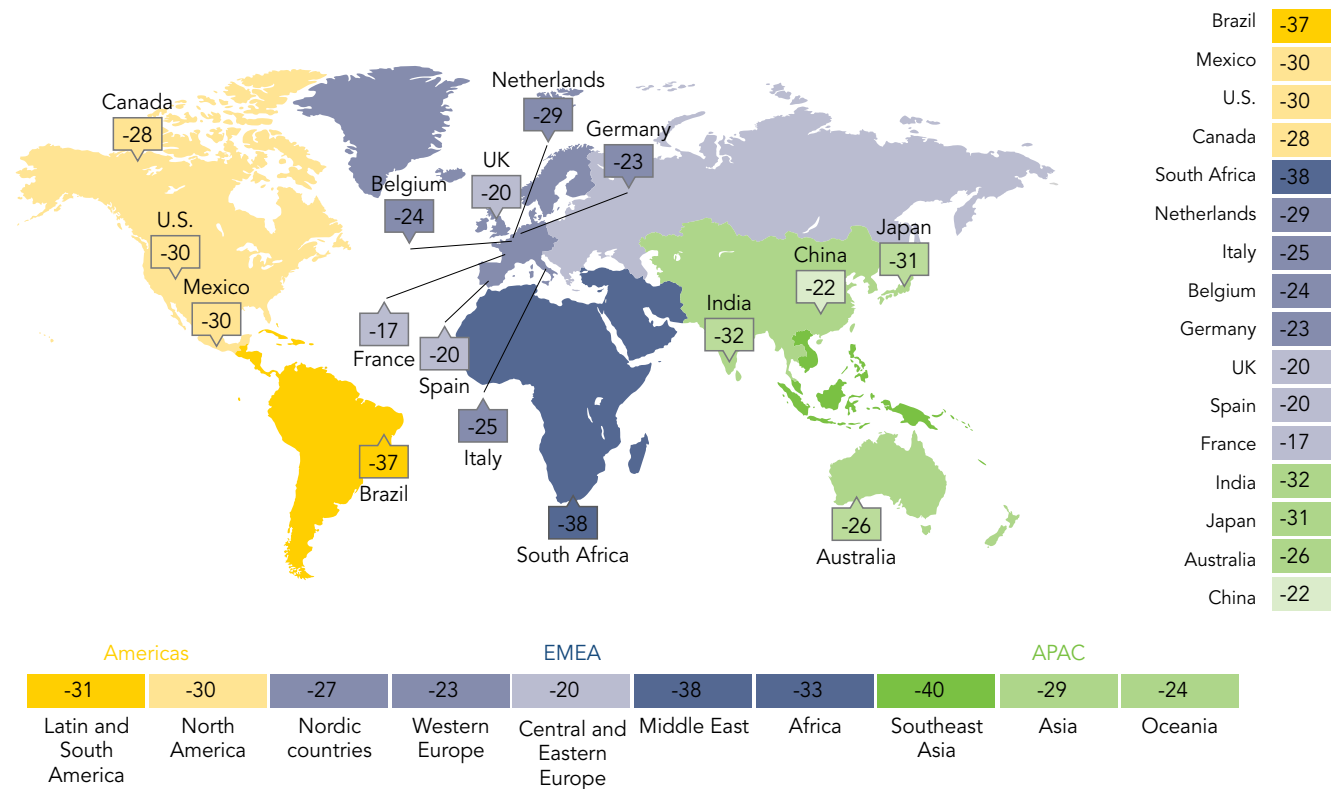
Employer perspective

The perceived need for providing employee learning and development is growing, while corporate ability to meet these needs is declining, resulting in a widening “capability gap.”

- **85%** of respondents in a 2015 Deloitte survey cited learning as “important” or “very important” – up 21% from the prior year, with the percentage rating tripling⁴ for “learning and development as being very important,”
- Yet only **40%** of respondents rated their organizations as “ready” or “very ready” in learning and development in 2015, compared to 75% in 2014⁴

The Deloitte Human Capital Capability Gap is a research-based score that shows HR’s relative capability gap by looking at the difference between respondents’ average “readiness” and “importance” ratings for each trend, indexed on a 0 – 100 scale—it is computed by taking the “readiness” index score and subtracting the “importance” index score. For example, a trend with a “readiness” index score of 50 and an “importance” score of 80 would produce a capability gap of -30. Negative values suggest a shortfall in capability, while positive values suggest a capability surplus.

Learning and development: capability gap by region



PT talent is at greater retention risk

The gap between talent’s desire for skills development and employer offerings creates a retention risk among PT talent—IT in particular—and among baby boomers, to some extent.

PT talent

In general, professional/technical (PT) talent feels strongly—above the global average—about the importance of evolving their skills, but rates employers below average for their performance in investing in building those skills. And PT talent considers itself more in demand (64 percent) versus the average global worker (58 percent), increasing the likelihood of their leaving for greener pastures if their expectations are not met.

IT talent

This talent group may be particularly at risk, given that it’s more important to them than any other skill cohort to invest in keeping skills

current. IT talent is confident in its market value and ability to find a new/better position:

- **71%** of IT talent feel in demand, vs. 58% global average
- **78%** feel their skill set and experience puts them in a position to compete effectively with other job seekers, vs. 74% global average

Baby Boomers

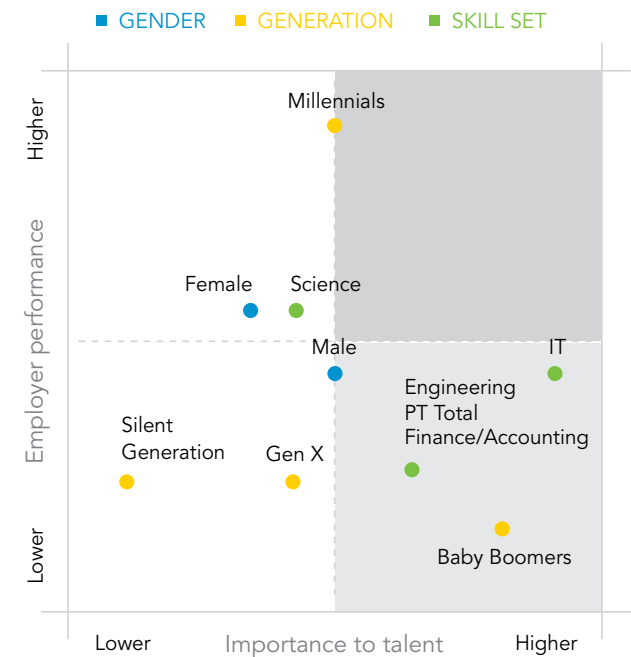
This group is at a slightly lower retention risk than other cohorts in the danger zone. While they rate the importance of skills development higher than their peers, they are feeling less confident than other workers:

- **60%** of baby boomers feel if they were to consider changing jobs, they are in a good position to secure a similar or better position of employment, vs. 64% global average

Skills development

Importance to talent versus perceived employer performance on skills development

- **The sweet spot for retention:** where employers want to be
- **The retention danger zone**
Talent needs and expectations are high, but employers aren’t meeting them



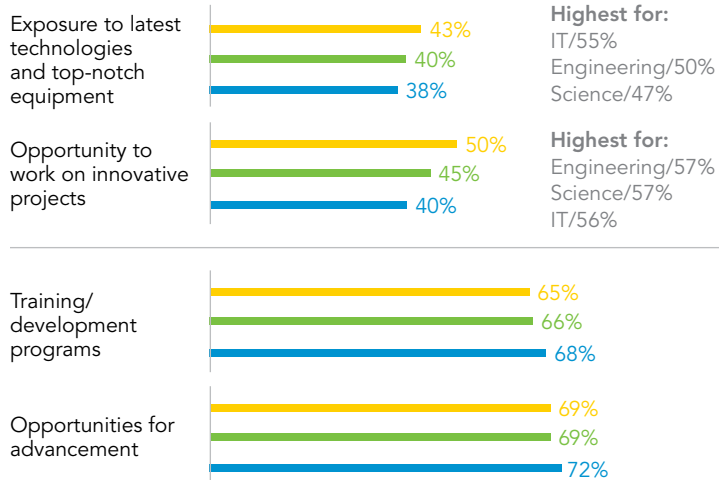
Professional/technical talent challenging the status quo

PT workers are at the leading edge of the DIY career paradigm: The opportunities to close skill gaps and showcase their skills will be an enticing factor for talent. When competing for the talent that knows it has other options, communicate these opportunities.

For PT talent, traditional approaches of attraction are no longer enough. Above average appetite to innovate and be exposed to the latest technologies are attraction factors worth leveraging.

While global workers, including professional/technical talent, are still prioritizing advancement and training opportunities (ranked third and fourth as attraction factors), PT talent stands out for above average desires to innovate and exercise their skills.

Comparing career development/advancement attraction factors with significant differences, PT versus non-PT:

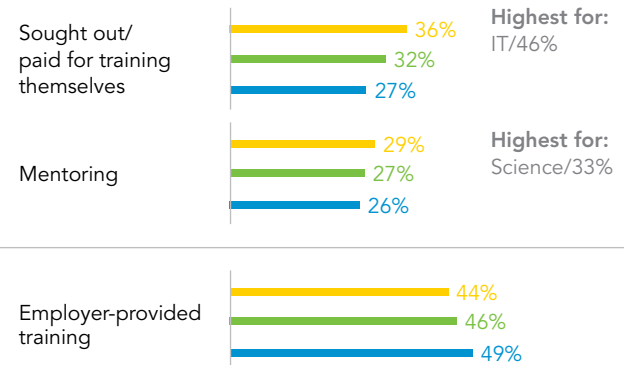


■ PT AVERAGE
■ GLOBAL AVERAGE
■ NON-PT AVERAGE

New recruiting paradigm: innovative career development trends

Old recruiting paradigm: traditional career development trends

Comparing use of career development resources with significant differences, PT versus non-PT:



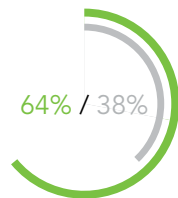
Professional/technical talent challenging the status quo (continued)

PT workers use career development resources DIY-style at higher rates than average worker

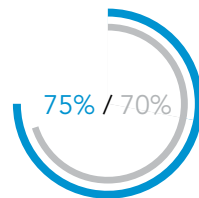
While workers in general take advantage of employer-provided training in higher numbers overall (after all, it is often free or subsidized), PT workers are pursuing resources that are consistent with DIY career path development options in higher numbers than other workers.

PT workers outscore the average on components of talent agility and confidence

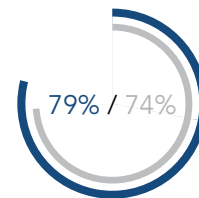
They are well aware of their market power/value, so if they are dissatisfied, they know they can find something better somewhere else.



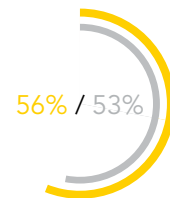
64% agree they are in high demand (vs. 38% overall)



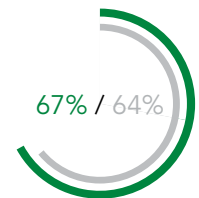
75% agree their employment experience to date has allowed them to develop skills that are in demand (vs. 70% overall)



79% agree that their skill set and experience puts them in a position to compete effectively with other job seekers (vs. 74% overall)



56% have sought career-related coaching and feedback from mentors and/or close associates (vs. 53% overall)



67% agree that if they were to consider changing jobs, they are in a good position to secure a similar or better position (vs. 64% overall)

Gaps in skill development opportunities create risk for employers

“Highly engaged,” or committed workers are passionate and driven. They are high contributors, but also have high expectations—they know their own value and want to succeed on their own terms.

The good news for employers

Committed employees are more likely to want to build skills and engage mentors. Of the global workers who are totally committed to their current employer:

- **64%** strongly agree it's important to keep skills up to date in changing economy, vs. 60% overall

- **38%** strongly agree that they sought career-related coaching and feedback from mentors and/or close associates, vs. 27% overall

Committed employees work hard for their employers. Of the global workers who are totally committed to their current employer:

- **71%** would definitely go above and beyond, vs. 52% overall

Committed employees are more likely than average workers to feel valued by their employer, and, in return, feel more loyal. Of the global workers who are totally committed to their current employer:

- **47%** feel highly valued, vs. 24% overall
- **60%** are more loyal than a year ago, vs. 35% for overall respondents

Gaps in skill development opportunities create risk for employers (continued)

The bad news for employers

Committed employees are less interested in tradeoffs—they value money and career advancement. Of the global workers who are totally committed to their current employer:

- **48%** aren't interested in making tradeoffs for higher pay, vs. 43% overall
- **54%** aren't interested in making tradeoffs for career advancement, vs. 49% overall

Less than a third feel their compensation is competitive. Of the global workers who are totally committed to their current employer:

- **29%** strongly agree their total compensation is competitive. Though significantly higher than the 18% average, it's low for such an important attraction/retention factor.

BRIDGING THE GAP

Expand leadership development opportunities.

- 50% of highly engaged workers say it would be a driver of employment choice, vs. 44% overall

Consider allowing "self-nomination" for leadership roles and succession planning, as managers may be reluctant to recommend highly engaged/talented workers for fear they will lose them. Self-nomination can also create a broader and more diverse talent pool.⁵

Components of talent agility

They know their own market value/power
Highly engaged workers outscore others on all six components pointing to talent agility, strongly agreeing that:

■ HIGHLY ENGAGED WORKERS ■ TOTAL AVERAGE



Millennials and the DIY career mindset

Millennials already comprise the majority of the workforce, globally and in the U.S. With their rising influence on workforce trends, it's important to understand the millennial's DIY career mindset.

Career development opportunities are key drivers in choice of positions/employers

When choosing one position/employer over another, a broad range of career development elements are key drivers for millennials, including:

- Opportunity for advancement (73%)
- Training/development programs (66%)
- Opportunity to work with colleagues who are recognized as knowledgeable and from whom they can learn (56%)
- Leadership development (45%)
- Opportunity to innovate/work on innovative projects/initiatives (45%)
- Exposure to latest technologies and top equipment (37%)

Known for "slash" careers/multiple gigs and income streams

The *New York Times* has dubbed it the "slash generation." Millennials often juggle multiple jobs—one that largely pays the bills, combined with others that satisfy their creative urges or allow them to contribute to causes that interest them. Ask a millennial what they do and you are likely to get a multi-part answer, e.g., lawyer/actor/producer, forensic psychiatrist/deejay, or research manager/baker.⁶

Freelancing is common, and an accepted way to advance a career

- **27%** of millennials call themselves free agents, with nearly 2 out of 3 considering free agency a lifelong career choice. And millennial free agents report more optimism about their advancement opportunities than traditional workers.
- **52%** of millennial free agents are satisfied with their opportunity to expand skills—significantly higher than the 42% of traditional millennial workers.

- **48%** of millennial free agents are satisfied with their opportunity to advance in their field/career—significantly higher than 37% of traditional millennial workers who are satisfied with this.

Entrepreneurial urge is strong

A 2011 survey funded by the Kauffman Foundation found that 54 percent of the nation's millennials either want to start a business or already have started one. The study found young Latinos and African Americans are even more motivated to start their own businesses (64 percent and 63 percent respectively) which could pose a challenge as corporations increasingly focus on diversity initiatives.⁷

Nearly half (47 percent) of millennials, more than older cohorts, agree/strongly agree that organizations need to value entrepreneurial mindsets and experiences.

Millennials and the DIY career mindset (continued)

Committed to staying on cutting edge of technology, keeping skills current

- **63%** of millennials feel strongly that their skills/knowledge need to evolve and grow in order to keep up with changes in their line of work or industry. Male and female millennials feel equally strongly about this.

Most likely to use, and praise, employer-sponsored learning opportunities

Millennials outscored other generations on their use of employer-sponsored training (with 48 percent taking advantage of the opportunity) and also tended to be more satisfied with the training offered than other

generations. (In absolute terms, satisfaction is still only lukewarm, with 13 percent very satisfied and 18 percent satisfied).

Millennials also had the highest participation rate (42 percent) of any generation in recent career discussions with their employer, matched with the highest percentage strongly agreeing the discussion was beneficial in terms of future advance opportunities (29 percent) and skills development (36 percent).

Limited loyalty to current employer for career development

Only 14 percent of millennials would place their loyalty with their employer as a means to develop, grow, and pursue their career goals,

versus 15 percent of Gen X, 18 percent of baby boomers, and 19 percent of the silent generation. At 28 percent, millennials are twice as likely to place their loyalty with their personal/professional networks and relationships instead.

And they're highly networked. While baby boomers and others are jumping on the social networking bandwagon, millennials have an average of 319 Facebook® friends versus 120 for baby boomers.⁸



DRIVE

Talent wants—needs—to stay fresh with skills; their workflow depends on it, and even more with free agent workers. So, as organizations bring independent contractors into their projects—either to infuse expertise or to drive innovation—organizations need to build a strong brand reputation that attracts those that are continuously working to stay on top of their game.

Recommendations: The era of DIY career development is well on its way

Replacing the tradition of employment is employability—and a new work covenant where do-it-yourself (DIY) career development is required.

Governing principles for talent managers on DIY career development:

Understand talent supply chain management

Study your organization's talent needs to build resilient teams in a multi-sourced globalized environment, leveraging your best human capital—which relies on individuals' capabilities, knowledge, skills, and experience from within and outside the organization.

Employer's responsibility

Give talent a place/opportunity for skills to be used and showcased, allowing talent to build a portfolio and increase employability.

Talent responsibility

Workers must perform to make the covenant work. Self-awareness/assessment is required to identify gaps and demonstrate technical and soft skills.

Employer branding

As workers place more attention on their personal brands, it is increasingly important for employers to put out a clear and compelling employer brand to draw the best talent possible, with the best fit.

Innovative engagement beyond retention

Employers need to offer ways for potential, current, and past employees to engage with the company, from training/development opportunities to online communities.

Encourage work-life design

Create an innovative, collaborative work environment to increase productivity and green-light workers to engage their passion, take risks, and practice/showcase their skills.

Reduce the use of talent non-compete agreements

Promote and encourage skill building throughout your industry's ecosystem, which ultimately enriches your organization's brand reputation.⁹

Experiment with innovative search techniques

"We have customers who are engaged in experiments at blinding the institution. Looking at assessments that are institution-free and how that affects their ability to get the talent they need."

—*Kelly Services CEO Carl Camden*

The new covenant

"There's an element of freelancers having more cutting edge skills. Freelancing is a lifestyle choice...as a freelancer, you have to make sure your skills stay current. I would expect them to have strong skill sets because they have to in order to compete, to put food on the table, by virtue of having to survive."

—*Procurement & Strategic Sourcing at Global 100 tech firm¹⁰*

"The knowledge transfer that occurs as a natural outcome of outside experts working alongside internal resources benefits the project, the employee, and the organization."

—*VP at Global 100 tech firm¹⁰*

Overview and methodology

A high-level look at workforce trends from Kelly

Background

To better understand the motivations behind the empowered workforce, and how employers can best act and react to worker expectations, Kelly Services® developed the Kelly Global Workforce Index (KGWI), an annual global survey that is the largest study of its kind. In 2015, Kelly collected feedback from 164,000 workers across 28 countries and a multitude of industries and occupations. In 2014, nearly 230,000 were polled in 31 countries.

This study takes a high-level look at career management—specifically the emerging trend of DIY career development as it pertains to the global worker seeking to be as resilient as possible in today’s uncertain environment. In addition to analyzing worker preferences and

psychographic insights based on 2015 and 2014 KGWI survey data, this study pulls insights from Kelly Free Agent research (2015) and develops macro employer/employee trends using standard secondary research sources.

Skilled candidates are in short supply across the globe. Employers in most any industry in search of workers to support growth and innovation have to contend with an employee driven market, in which organizations face intense competition to secure and retain the best talent. Understanding DIY career resilience as a recruiting advantage in which training, skill development, and talent showcasing is a new, highly coveted benefits category can unlock much needed advantage for companies and workers alike.

KGWI response detail

By category	Number of responses	
	2015	2014
Global Workforce Total	164,021	229,794
Employment status		
Employed full time	57,908	66,216
Employed part time	11,814	16,482
Temporary/casual/contract work	16,299	23,680
Unemployed	12,754	21,451
Looking for work	22,425	22,161
Retired	1,060	1,262
Industry breakout		
Engineering	11,942	10,792
Finance and Accounting	10,287	16,150
Information Technology	9,847	10,501
Science	5,694	6,920
Geographic breakout		
The Americas	102,321	135,049
EMEA	50,107	71,134
APAC	11,593	21,080
Generational breakout		
Millennials (1980-1995)	56,998	64,475
Gen X (1965-1979)	37,428	51,073
Baby Boomers (1946-1964)	20,382	28,789
Silent Generation (1935-1945)	576	1,140

Footnotes

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